

Eight Habits of Successful Taxonomists

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20 years experience as a consultant, Product Manager, Information Manager working for small to Fortune 100 companies. The past ten years have been spent leading information and knowledge management projects and products spanning Search, Auto-categorization, Expert systems, Content Management, and Governance for companies including IBM, Microsoft, Raytheon, Reed Elsevier, Disney, Associated Press, REI..

Taxonomy???

Collection of terms and relationships between terms used to describe a domain. (And hopefully created to address a real business problem)

ANSI Thesaurus

Traditional BT/NT taxonomy

Controlled Vocabularies

Ontologies

Controlled value lists

Folksonomies?

etc

Terms or relationships may or may not have rich attributes associated with them

What is the difference between a “taxonomy” and an “enterprise taxonomy”

Not much

Both are collections of terms and relationships between the terms

Both are generally managed by a taxonomist

Both are designed to meet specific business needs

Everything

An enterprise taxonomy is...

Designed and built to be used by more than one system

Used by people in different business units or divisions

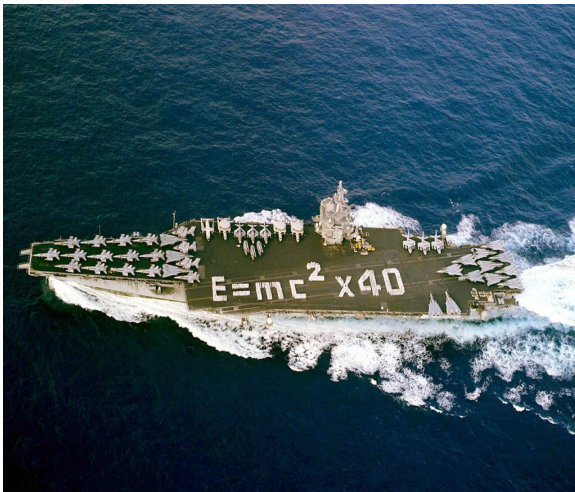
Managed with strong change control and security requirements

Managed by business owners as well as taxonomists

Enterprise???

A large organization with multiple business units sharing a common mission.

In general the different business units (divisions) may have their own mission statements designed to support the enterprise mission.



Eight Habits????

Well, actually, approaches, things to keep in mind, best practices, etc when negotiating the people, systems, data and politics of an enterprise.



#1 – Sets Expectations

Taxonomies are essential for an organization, but...

Sharing data is hard (Sharing is hard in general)

- Especially across business units
- Legal and security issues often arise
- Workflow requirements often arise
- Did I mention politics?



Integrating Information across systems is expensive and will require

- Staffing
 - for development and on-going support
 - often requires hard to find expertise
- Software – COTS or custom (both are expensive)
- Hardware



#2 Knows the Technology

Understanding the capabilities and limitations of the technology is essential for designing solutions and building credibility with IT teams

Using taxonomies in multiple systems requires extensive technical integration and work with IT teams

#2 Knows the Technology

Checklist items:

Integration formats (Webservices, CSV, XML, EDI, RDF, Homegrown, etc)

Target and Modeling system capabilities

- Scalability

- Complexity of data structures it can manage

- Frequency of change (manual and programmatic)

- Use of ID's

Enterprise IT standards and service level agreements

#3 Pays attention to workflow

Once the taxonomy is going to be used by more than one group or system in an organization, workflow and governance often become crucial components of a solution. Workflow and governance can have huge impacts on the taxonomy model.

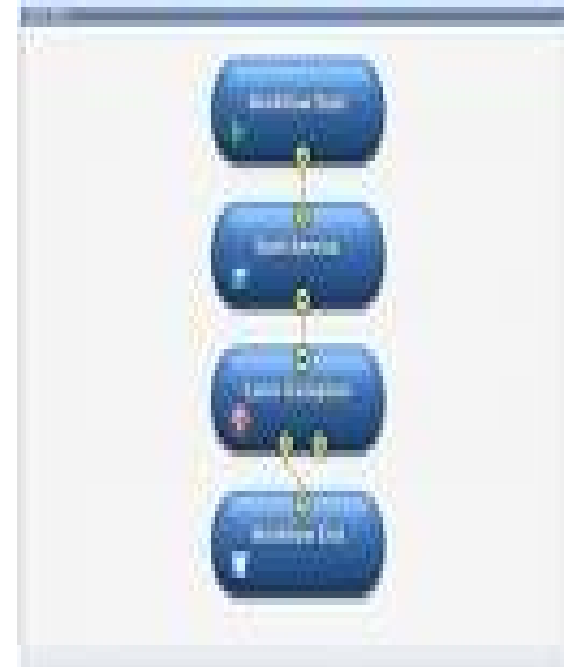
Check list:

Develop use cases for existing and desired workflows

Identify security requirements (for Add, Modify, Delete, and Viewing) of the taxonomy. (“November Layoff's” for example)

Identify and document governance procedures

User interfaces (GUIs, Reports, APIs needed)



#4 Avoids religious wars

A thesaurus can be an Ontology or a Taxonomy or a Controlled Vocabulary, or a... or a....

The ANSI Spec is ... well,... The ANSI spec

RDF VS XML

Homegrown VS COTS tools

Folksonomies????

Community

Checklist

Leave dogma at the door



#5 Follows the money

1- Follow the money

2- Follow the money

3- Follow the money

Checklist:

Create a business case (Problem, Cost, Solution, Approach)

Document exactly how the taxonomy supports the business

- ROI
- Legal requirements
- Brand management
- Customer Satisfaction
- Business / Financial reporting

Get involved with the marketing team



#6 Is a good listener

People get very attached to their data and are much more likely buy into change if they know their input is part of the plan.

Check List

Don't call the baby ugly (you can call the baby messy)

Document the uses, users, inputs and exports of the data

Connect groups within the organization

Connect data to the business when talking with people



#7 Does not use the word “Taxonomy” in polite company

We all know what we mean by the word taxonomy ... (Do we?)

We all know how important they can be

However...

Very few companies consider taxonomies to be profit centers.

The value of taxonomies is generally 2 or 3 levels removed from real revenue or efficiency gains.

#7 Does not use the word “Taxonomy” in polite company

So...

Be ready to talk about the 2 or 3 steps between the taxonomy and the revenue or increased efficiency.

Treat and talk about the taxonomy as corporate asset

Try Try Try to work on projects connected to revenue – the marketing team is your friend

#8 Is a good juggler

Requirements gathering

Business analysis

Integration planning

Business Process Analysis

Use Case generation

Taxonomy building



Identify the business problem at the start of any project

Gathering requirements for a taxonomy is a huge process and can lead to many different areas of an organizations

Align your projects with the business and preferably with revenue, rather than efficiency

Have Fun

Questions?

Thank You!

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